



# MailGuard Management Console

## Release Management Manual

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## Document and Naming Conventions

The following standards apply to this user manual.

- The names of pages are referred to in ***Bold Italic*** letters. For example, the ***Management Portal*** page or the ***Users*** page.
- The names of fields (i.e. buttons, menus, text boxes, etc.) are referred to in **Bold** letters. For example, the **Configure** menu or the **Submit** button.
- The values of fields (i.e. data entered by the user on a page's given fields) are referred to in *Italic* letters. For example, *Yes* or *No* as options in a dropdown box.
- Actions that link to other sections in the document are referred to in Underlined letters. For example, the Management Portal section.

## OVERVIEW

The Release Management feature allows you to configure how you want users in your organization to release a quarantined email message and optionally, whitelist similar quarantined email messages in the future.

### Release quarantined email messages

All users in your organization can potentially request the administrator to release a quarantined email message or they can release a quarantined email message on their own.

For example, you can configure the feature for the entire organization such that no users in the organization can directly release email messages from quarantine, but the CEO is allowed to release his or her own messages without administrative review.

You can also stop users from requesting and releasing the quarantined email message by turning off the respective options.

### Whitelist future messages

With this feature, messages which would normally be blocked by a particular policy can be automatically released, or “whitelisted” in the future.

Users can be granted permission to add messages to the whitelist directly, or they can be required to request the whitelisting through administrative review. You can also stop users from requesting and adding sender email addresses to the whitelist by turning off the respective option.

### Release Management configuration

The options that you select in the Release Management configuration change what options your users are given in the email alert they may receive when one of their messages is quarantined. If your configuration allows it, a secure link will be added to the alert message, which your users can click to request that their message be released, and optionally whitelisted.

The administrator user can view all the release requests in the queue on the **Release Requests** page. For each request the administrator can view the same information available in the **Quarantine** interface. After reviewing the details the administrator user can either approve or deny the request.



**Note:** All end user features of Release Management require policy alerts to be configured to send to end user recipients.

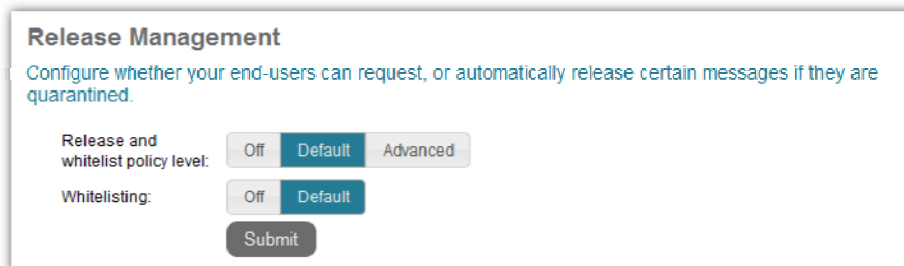


**Note:** Release Management is only available to organisations who have updated their preferred console to the new unified management console.

# CONFIGURATION

## Configure Release Management for a company

In the main menu bar of the MailGuard Management Console click **Configure** > **MailGuard** then select **Release Management** from the menu at the left.



The screenshot shows the 'Release Management' configuration page. At the top, it says 'Release Management' followed by a description: 'Configure whether your end-users can request, or automatically release certain messages if they are quarantined.' Below this, there are two settings: 'Release and whitelist policy level' with buttons for 'Off', 'Default' (selected), and 'Advanced'; and 'Whitelisting' with buttons for 'Off' and 'Default' (selected). A 'Submit' button is at the bottom.

The *Default* button for the **Release and whitelist policy level** option activates Release Management and uses the default settings. For greater control over your settings use the *Advanced* option, or select *Off* to disable all Release Management features. When the policy level is set to *Default* or *Advanced*, you can also elect to use *Default* or *Advanced* Whitelisting features.

When the **Release and whitelist policy level** setting is *Off*, you cannot turn on **Whitelisting** and the options will disappear. When set to *Default*, whitelisting can either be *Off* or *Default*. **Advanced Whitelisting** features are automatically available when you use the *Advanced* policy level.

## Default Settings

Using the *Default* option for both the **Policy level** and **Whitelisting** gives these default behaviours

**Spam, Content, Message Size and Offensive Language** – messages quarantined by these policies can be released by end users, and they can also request whitelisting of similar messages so they are not quarantined again in the future.

**Attachments** – messages stopped because of attachments require administrator review to release. End users also cannot request that such messages be whitelisted in the future.

**ImageGuard** – organisations using ImageGuard have the additional ability to configure Release Management for messages blocked containing inappropriate images. By default, these messages require administrator review to release. End users also cannot request that such messages be whitelisted in the future

## Advanced Settings

The **Release Management** page displays the filter policies for which the email messages can be quarantined. For each filter policy type you can view and change the default settings.

## Release Management

Configure whether your end-users can request, or automatically release certain messages if they are quarantined.

Release and whitelist policy level:
Off
Default
Advanced

### Spam

Messages can be released by:
Off
Admin Review
On
End users can request whitelist:
Off
Admin Review
On

### Content

Messages can be released by:
Off
Admin Review
On
End users can request whitelist:
Off
Admin Review
On

### Message Size

Messages can be released by:
Off
Admin Review
On
End users can request whitelist:
Off
Admin Review
On

### Offensive Language

Messages can be released by:
Off
Admin Review
On
End users can request whitelist:
Off
Admin Review
On

### ImageGuard

Messages can be released by:
Off
Admin Review
On
End users can request whitelist:
Off
Admin Review
On

### Attachments

Messages can be released by:
Off
Admin Review
End users can request whitelist:
Off
Admin Review

Submit

For each filter policy type the options for **Messages can be released by** are described in the following table:

Button	Description
<i>Off</i>	Only the administrator user can release the quarantined email message and add the sender email address into the whitelist users list. Users cannot request or release the quarantined email message on their own. All alerts and digest emails become simple notifications.  Setting release to <i>Off</i> also disables whitelist capabilities.
<i>Admin Review</i>	All users have to request the administrator to review the request and then take the appropriate action on the quarantined email message. However, individual users' settings take precedence over the company-wide setting.
<i>On</i>	All users, on their own, can release the quarantined email without administrator intervention.

For each filter policy type the options for **End user can whitelist** are described in the following table:

Button	Description
<i>Off</i>	Whitelisting for this policy type is not available to end users. There is no process for requesting whitelisting. Administrators still have the ability to whitelist senders, but not at a user's request.
<i>Admin Review</i>	All users have to request the administrator to review the request and then take the appropriate. However, individual users' settings take precedence over the company-wide setting.
<i>On</i>	All users can add the sender email address into the whitelist for this policy type.

After making changes, click the **Submit** button to save the settings.

### Configure Release Management for an individual user

Find the user whose Release Management configuration you wish to modify.

1. In the main menu bar of the Management Console click **Configure > Users**.
2. In the list of users click the **Edit** button for the user for whom you want to configure Release Management.
3. In the menu at the left click **Release Management**.
4. Select the *Company Default* option (which is the default setting for all users) for the **Release and whitelist policy level** to set the same default options that you have set for your organization.
5. Optionally, use the *Advanced* option for greater control over this user's abilities.
6. Click the **Submit** button to save the settings.

The Release Management page displays the filter policies for which you can view the default settings or customize the settings.

For each filter policy type the options for **Messages can be released by** are described in the following table:

Button	Description
<i>Off</i>	Only the administrator user can release the quarantined email message and add the sender email address into the whitelist users list. The user cannot request or release the quarantined email message on their own. All alerts and digest emails become simple notifications.  Setting release to <i>Off</i> also disables whitelist capabilities.
<i>Admin Review</i>	The user has to request the administrator review the request and then take the appropriate action on the quarantined email message.

Button	Description
<i>On</i>	The user can release the quarantined email without administrator intervention.

For each filter policy type the options for **End user can whitelist** are described in the following table:

Button	Description
<i>Off</i>	Whitelisting for this policy type is not available to this user. There is no process for requesting whitelisting.
<i>Admin Review</i>	The user must request the administrator to review the request and then take the appropriate action.
<i>On</i>	This user can add the sender into the whitelist for this policy type without administrator intervention.

After making changes, click the **Submit** button to save the settings.

## THE REQUEST PROCESS

### Making a release and whitelist request

1. From the email client on the users system, open the alert email message that was received for the quarantined email message.
2. In the email message click the **Request Release** button at the bottom of the message. Even if the user has the ability to request whitelisting, the button still says **Request Release**.
3. The user's web browser will open and they will be given the ability to review the message before requesting release and, if they have permission, request whitelist.

**Release Message**

**Sender:** sample@gmail.com

**Recipient:** john.smith@example.com

**Subject:** Sample Email

**Policy:**

Automatically release similar messages from this sender: ☐ No

**Request Release**

4. If the user requests whitelisting, they will also be required to provide a reason for the whitelisting. This gives administrators the information they need to make an informed decision.

5. Click the **Request Release** button send the request to the administrator. The administrator will receive a notification email, and the message will be available in the **Release Requests** page in the management console.

## Managing release requests

When a request is made, an alert is sent to the administrator. At any time, the administrator can review the request queue from the console by going to **Configure > MailGuard** then select **Release Requests** from the menu at the left.



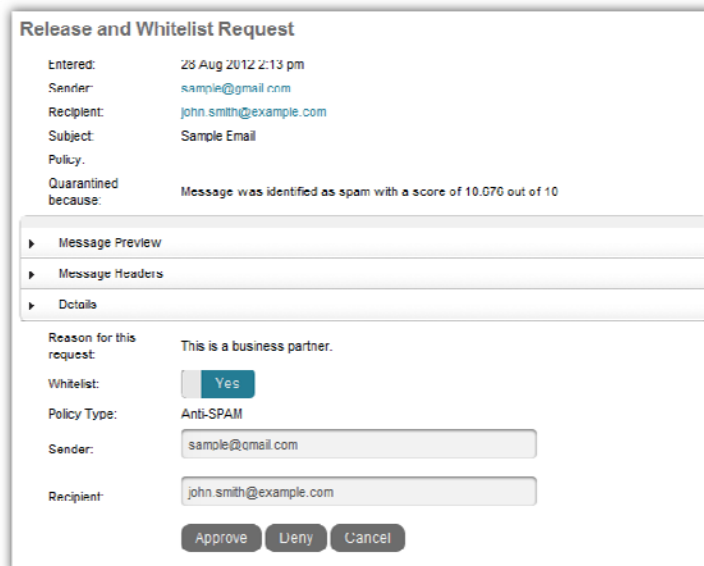
The screenshot shows a web interface titled "Release Requests" with a subtitle "(Manage your users' requests for release and/or whitelist of messages in quarantine.)". It features a table with columns: Entered, Sender, Recipient, and Type. A search bar is located on the right. Below the table, it says "Showing 1 to 1".

Entered	Sender	Recipient	Type
28 Aug 2012 2:13 pm	sample@gmail.com	john.smith@example.com	Spam

From the email the administrator receives, they can follow the link to review this queue directly.

The administrator has two options from this screen. Clicking **Deny** will deny the request, but it won't delete the message from the quarantine. An administrator can still find the message in the **Quarantine** interface at any time until it's either explicitly deleted or is automatically purged.

To learn more about the request, the administrator clicks **View**. This opens the request and allows the administrator to get more information about the request.



The screenshot shows a detailed view of a "Release and Whitelist Request". It includes fields for Entered, Sender, Recipient, Subject, Policy, and Quarantined because. Below these are expandable sections for Message Preview, Message Headers, and Details. The Details section is expanded, showing the reason for the request, a whitelist toggle, policy type, and sender/recipient email addresses. At the bottom are buttons for Approve, Deny, and Cancel.

**Release and Whitelist Request**

Entered: 28 Aug 2012 2:13 pm  
Sender: sample@gmail.com  
Recipient: john.smith@example.com  
Subject: Sample Email  
Policy:  
Quarantined because: Message was identified as spam with a score of 10.070 out of 10

► Message Preview  
► Message Headers  
► Details

Reason for this request: This is a business partner.  
Whitelist: ☒ Yes  
Policy Type: Anti-SPAM  
Sender: sample@gmail.com  
Recipient: john.smith@example.com

Approve Deny Cancel

From this screen, the administrator can **Approve** the request, releasing the message from the quarantine. The **Deny** button has the same function as the previous screen and does not delete the message from the quarantine. To close the window without taking any action, use the **Cancel** button.



If the user requested whitelisting, the Yes option will be selected and the sender and recipient for the whitelist entry will be populated. The reviewing administrator can remove these addresses to expand the scope of the whitelist to the entire company or the domain of the other party.

If the user did not request whitelisting, the administrator can still elect to whitelist similar messages in the future. This can save time when repeated requests come in for the same email.

## WHITELISTING

Administrators have full control over their organisation's whitelist, even when end users don't have any ability to request or create whitelist entries.

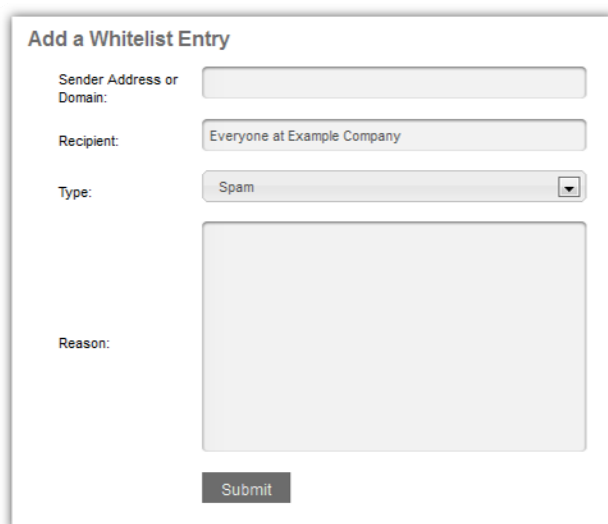
To access the whitelist, go to **Configure > MailGuard** then select **Active Whitelist** from the menu at the left



**Active Whitelist**  
Manage the addresses and message types which are whitelisted against quarantine.

Entered	Sender	Recipient	Type	
<input type="button" value="Add"/>				<input type="text"/>
	sender@trustedcompany.com	user@example.com	Attachment	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
28 Aug 2012 2:25 pm	sample@gmail.com	john.smith@example.com	Spam	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Showing 1 to 2				

Use the **Add** button to add a new entry to the whitelist.



**Add a Whitelist Entry**

Sender Address or Domain:

Recipient:

Type:

Reason:

The administrator can elect to whitelist a single address or an entire domain. The **Recipient** can be a single address, or left with the default *Everyone at Your Company*.

Whitelist entries can be made against *All Policy Types (except virus)* or single policy types (*Spam, Content, Size, Offensive Language, and Attachment*. ImageGuard customers will also have the ability to select *ImageGuard*)

The **Reason** setting gives the administrator the ability to record the reason why they've reduced security settings in this instance and is required in all cases.

Click **Submit** to add the whitelist entry to the organisation's whitelist.

Each entry in the whitelist can be removed using the **Delete** button or viewed and modified using the **Edit** button, with the same options as adding a new entry.

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